AIRPORTS COUNCIL INTERNATIONAL

10 YEAR ANNIVERSARY

ACI 10TH ANNUAL AIRPORT ECONOMICS & FINANCE CONFERENCE & EXHIBITION

RADISSON BLU PORTMAN HOTEL, LONDON

9 – 11 APRIL 2018

Presented in partnership by:

ACI World
ACI EUROPE
ACI Asia-Pacific

Supporting organisation:

WORLD BANK GROUP

Organiser:

aviation media

Incorporating the 4th ACI-World Bank Annual Aviation Symposium

SAVE THE DATE

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ACI-WORLD BANK ANNUAL AVIATION SYMPOSIUM PROGRAMME

MONDAY, 9 APRIL 2018

The ACI-World Bank Annual Aviation Symposium will be lead by Charles Schlumberger, Lead Air Transport Specialist, The World Bank who will create an interactive and exciting forum of discussion. He will be joined by senior representatives from airports, investment banks and financial institutions around the world.
Please note that if you wish to attend the Symposium, you will need to choose the 3-day registration fee. The cost of attending the Symposium is not included in the conference fee - there is a small additional charge.

08:30 - 09:00 REFRESHMENTS ON ARRIVAL

09:00 - 09:45 INTRODUCTION

09:45 - 10:50 SESSION ONE: ACADEMIC SESSION ON PPP THEORY (INCLUDING A BRIEFING BY THE WORLD BANK)

10:50 - 11:15 NETWORKING REFRESHMENT BREAK

11:15 - 12:30 SESSION TWO: FORECASTING UNDER UNCERTAIN CONDITIONS (WATF)

12:30 - 13:30 NETWORKING LUNCH

13:30 - 15:45 SESSION THREE: PRACTICAL EXERCISE

15:45 - 16:00 SYMPOSIUM CONCLUSIONS

18:30 - 20:00 ACI AIRPORT ECONOMICS & FINANCE CONFERENCE & EXHIBITION WELCOME RECEPTION

www.aci-economics.com

ACI AIRPORT ECONOMICS & FINANCE CONFERENCE PROGRAMME

DAY 1 - TUESDAY, 10 APRIL 2018

The conference will consist of numerous high-level sessions including cutting edge presentations and panel discussions from industry leaders, top level decision makers and other airport professionals.

08:00 - 09:00 REFRESHMENTS ON ARRIVAL IN THE EXHIBITION

09:00 - 10:30 WELCOME AND KEYNOTE ADDRESSES

10:30 - 11:00 NETWORKING REFRESHMENT BREAK IN THE EXHIBITION

11:00 - 12:30 SESSION ONE: PURE FINANCE AND ECONOMICS (PANEL DISCUSSION)

The future growth of the airport industry means committing today to significant capital plans with long time-horizons. Investors will look for safe assets and stable income streams, but risk levels are increasing in many regions making financing a challenge. Furthermore, airports around the world face a more competitive business market and have to operate as commercial entities. At the same time, the underlying structure of airports' business models is changing. In addition to PPPs, concessions and the expansion of global airport groups change how airports operate. This panel will discuss these topics.

12:30 - 13:30 NETWORKING LUNCH IN THE EXHIBITION

13:30 - 15:30 SESSION TWO: AIRPORT COMPETITION DYNAMICS

PART ONE – THEORY (PANEL DISCUSSION)

Airports need to attract both airlines and passengers. Traditional views of airport competition focused on local catchment areas. But today, in an aviation industry that is consolidating to a few airlines that can quickly re-deploy their aircraft to more profitable routes, airports have to compete for airline services on a pan-European basis. As a result, airports are constrained by the buyer power of their customers. Airports do not have thousands of individual customers, but only a dozen or so buyers with significant influence. Further, large hub airports are under pressure from the 'super connector' airlines' hubs in the Gulf as well as hub-bypass. The need to maintain transfer passenger volume is strong driver of charges reductions.

PART TWO - CASE STUDIES

What have airports done to 'win' new routes? How do airports demonstrate their potential to airlines to gain new air services? What product does an airport need to focus on? How can development of surface connections help an airport compete more broadly? And how will self-connections change airport competition?

15:30 - 16:00 NETWORKING REFRESHMENT BREAK IN THE EXHIBITION

16:00 - 17:15 SESSION THREE: THE ECONOMIC VALUE OF A SLOT

The Economist wrote in November that the battle for Monarch Airline's slots after its bankruptcy "is a sign of how much the system for allocating them harms competition and consumers." The newspaper concludes that despite the challenges "the case for change is nonetheless clear." What is the way forward? How can the true value of slots be found, and how should the value that is created with a slot be allocated?

17:15 - 17:30 LIVE INTERVIEW

19:30 - 22:30 GALA DINNER

GALA DINNER - TUESDAY, 10 APRIL 2018

Royal Institute of British Architects, London

Enjoy an evening of networking with fellow delegates, sponsors, exhibitors and speakers at the Royal Institute of British Architects, a unique and prestigious central London venue boasting many wonderful architectural features – www.riba-venues.architecture.com

The Gala Dinner is included within the delegate package. Please indicate on the Registration Form if you wish to attend & whether you have any special dietary requirements.

ACI AIRPORT ECONOMICS & FINANCE CONFERENCE PROGRAMME

DAY 2 - WEDNESDAY, 11 APRIL 2018

08:30 - 09:10 REFRESHMENTS ON ARRIVAL IN THE EXHIBITION

09:10 - 09:15 WELCOME ADDRESS

09:15 - 10:30 SESSION FOUR: AIRPORT NETWORKS

Today, 69% of countries have some sort of airport networks and nearly half of the World's airports belong to airport networks. Airport networks have also come to support equal opportunities in terms of accessibility, connectivity and economic development. By ensuring the sustainable funding of smaller non-economically viable airports, in compliance with ICAO's guidelines, airport networks have become essential to safeguard and enhance connectivity for all regions concerned - ensuring that all areas remain interconnected without any community being neglected. But the network model is being challenged. What can future regulation do to address concerns and advance the network model?

10:30 - 10:45 LIVE INTERVIEW

10:45 - 11:15 NETWORKING REFRESHMENT BREAK IN THE EXHIBITION

11:15 - 12:30 SESSION FIVE: INVESTORS' ROUND TABLE (PANEL DISCUSSION)

Reliance on private investors to provide financing for investment in capacity to meet the future demand will increase as governments step back. What do investors look for in the frameworks for regulation and operations? What do investors want in terms of transparency and consistency. What do investors seek during a privatisation to make it interesting? In sum, it is clear that investor appetite for airports is increasing, and this means that airports and regulatory systems must be considered in depth.

12:30 - 13:30 NETWORKING LUNCH IN THE EXHIBITION

13:30 - 14:45 SESSION SIX: REGULATION: A GLOBAL PERSPECTIVE

A wide range of regulatory approaches have evolved to address the equally wide range of circumstances in which airports operate. For many years now airports have operated as commercial entities and not as public utilities, and the shift of the airline industry globally away from one of fragmented flag carriers to one of regional powerhouses and global alliances means that airports face fewer customers. Regulators have to be careful to not move too quickly but also adjust to the actual situation and its likely development. What are regulators doing around the world to adapt to the changing market and what does this mean for the range of regulatory approaches?

Programme is subject to change without priot notice. Correct as of 6 December, 2017.

CONFIRMED SPEAKERS

Angela Gittens, Director General, ACI World

Gunter Heinrich, Head of Flying Schedule Management, Fraport

Jon Iversen, Chair of the ACI EUROPE Policy Committee, General Counsel, Attorney, Corporate Affairs and Legal

Olivier Jankovec, Director General, ACI EUROPE

Aram Karagueuzian, Manager, Airport Traffic Statistics and Forecasts, ACI World

Keith Mason, Professor & Head of Air Transport Management, Cranfield University

Michael McGhee, Partner, GIP

Richard Moriarty, Consumers and Markets Director, Civil Aviation Authority

Warren Mundy, Chief Economist, Australian Airports Association

Nicolas Notebaert, Chief Executive Officer, VINCI Concessions & Chairman, VINCI Airports

Charles Schlumberger, Lead Air Transport Specialist, The World Bank

Kim Stangeby, Chief Strategy Officer, Greater Toronto Airport Authority

Michael Stanton-Geddes, Economics Manager, ACI EUROPE

Ian Twinn, Head of Infrastructure Portfolio, IFC

Carlos Velasquez Monge, Director General, Guatemala City

ACI 10TH ANNUAL **AIRPORT ECONOMICS & FINANCE** CONFERENCE & EXHIBITION

10 YEAR ANNIVERSARY

AIRPORTS COUNCIL INTERNATIONAL

Presented in partnership by:

AIRPORTS COUNCIL INTERNATIONAL

ACI World
ACI EUROPE
ACI Asia-Pacific

Supporting organisation:

WORLD BANK GROUP

Organiser:

aviation media

ABOUT AE&F

Join Airports Council International (ACI) for the comprehensive ACI 10th Annual Airport Economics & Finance Conference & Exhibition and the 4th ACI-World Bank Annual Aviation Symposium in London from 9–11 April 2018.

The event is expected to host 250 delegates from over 50 different countries around the world including airport chief executive officers, chief financial officers, accounting and commercial managers, investment banks and financial institutions, rating agencies, airport finance consultants, airport investors, airports seeking investment, regulators and insurance companies.

Angela Gittens,
Director General, ACI World

Olivier Jankovec,
Director General, ACI EUROPE

Patti Chau,
Regional Director, ACI Asia-Pacific

REASONS TO ATTEND

As an attendee you will benefit from:

- Expert opinions and cutting edge presentations from the airport, investor and financial communities
- Discovering the latest trends, key issues and challenges facing our industry
- Exclusive networking opportunities with members from ACI World, ACI EUROPE and ACI Asia-Pacific, as well as 250+ delegates from around the world
- Exciting social networking events including welcome reception, gala dinner, refreshment breaks and lunches

ABOUT ACI

ACI is the only global trade representative of the world's airports.

Established in 1991, ACI represents airport interests with governments and international organizations such as ICAO, develops standards, policies and recommended practices for airports, and provides information and training opportunities to raise standards around the world.

ABOUT THE WORLD BANK

The twin goals of the World Bank are to:

- End extreme poverty by decreasing the percentage of people living on less than $2.25 a day to no more than 3%
- Promote shared prosperity by fostering the income growth of the bottom 40% for every country

SPONSORSHIP OPTIONS

WHY SPONSOR?

The ACI sponsorship programme is designed to give you increased exposure to the airport industry's top leaders. With four main levels of sponsorship, as well as a number of customized sponsorship opportunities, our packages will:

- **Help you target the right people in the industry**
- **Heighten your brand exposure**
- **Ensure that you stand out as a leader in an established market**
- **Give you the opportunity to cultivate new and existing relationships**

The advantage of ACI's role in the airport community

As the voice of the world's airports, ACI plays an important role in the airport community. The Annual Airport Economics & Finance Conference & Exhibition is the time and place where our airport and World Business Partners and Associate members come together. Sponsoring makes a positive impact on airport executives' purchasing decisions.

PLATINUM LEVEL

ACI MEMBER RATE: **€12,500**

- Presented as Platinum Sponsors
- Six full event passes
- Tabletop exhibition stand
- Company logo on all pre-marketing activities and signage in the conference room and exhibition area
- Two seats at a VIP table at the Gala Dinner
- Company logo and 200-word profile in the event guide
- Company brochure to be distributed at the conference

GOLD LEVEL

ACI MEMBER RATE: **€10,000**
NON-ACI MEMBER RATE: **€12,500**

- Presented as Gold Sponsors
- Four full event passes
- Tabletop exhibition stand
- Company logo on all pre-marketing activities and signage in the conference room and exhibition area
- Company logo and 100-word profile in the event guide
- Company brochure to be distributed at the conference

SILVER LEVEL

ACI MEMBER RATE: **€3,500**
NON-ACI MEMBER RATE: **€5,500**

- Presented as Silver Sponsors
- One full event pass
- Company logo on all pre-marketing activities and signage in the conference room and exhibition area
- Company logo and 50-word profile in the event guide
- Company brochure to be distributed at the conference

ACI-WORLD BANK ANNUAL AVIATION SYMPOSIUM

ACI MEMBER RATE: **€10,000**

- Presented as ACI-World Bank Annual Aviation Symposium Sponsors
- Four full event passes
- Company logo on all pre-marketing activities and signage in the conference room and exhibition area
- Company logo and 100-word profile in the event guide
- Company brochure to be distributed at the conference

OTHER SPONSORSHIP OPTIONS

- **WELCOME RECEPTION SPONSOR:**
  ACI MEMBER RATE **€15,000**
- **LUNCH SPONSOR:**
  ACI MEMBER RATE **€7,500**
  NON-ACI MEMBER RATE **€12,000**
- **REFRESHMENT BREAK SPONSOR:**
  (4 AVAILABLE)
  ACI MEMBER RATE **€3,500**
  NON-ACI MEMBER RATE **€5,500**
- **DELEGATE FOLDERS SPONSOR: €10,000**
- **DELEGATE BAG SPONSOR: €7,500**
- **LANYARD SPONSOR: €5,000**
- **HOTEL KEY CARD SPONSOR: €4,000**
- **DELEGATE BADGE SPONSOR: €3,000**

FOR SPONSORSHIP OPPORTUNITIES, CONTACT:
Andrew Hazell: +44 (0)7495 611 215
andrewh@aviationmedia.aero

(ACI reserves the right to review/approve all materials)

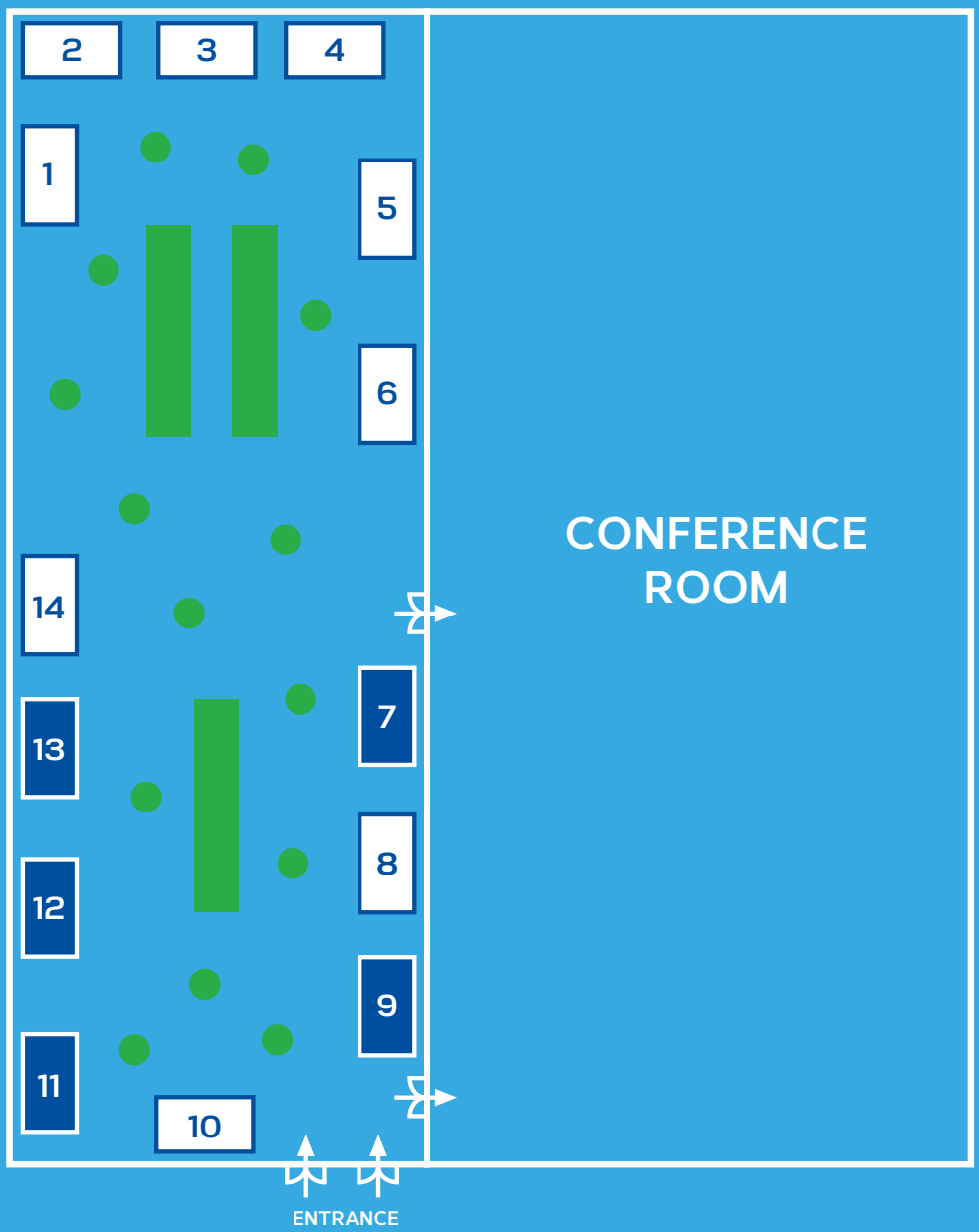
EXHIBITION FLOORPLAN

TABLE TOP RATE

ACI MEMBER RATE: **€3,950**
NON-ACI MEMBER RATE: **€5,950**

The exhibition rate includes TWO free conference passes.

Tabletop exhibition stands allow your company to be positioned in the main networking area where all lunches, refreshment breaks and the Welcome Reception are held.



EXHIBITORS

7 eJet
9 Mott MacDonald
11 ACI
12 Gatwick Airport
13 Edinburgh Airport

Available booth | Sold booth | Refreshments

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ACI 10TH ANNUAL AIRPORT ECONOMICS & FINANCE CONFERENCE & EXHIBITION

REGISTRATION FORM

Presented in partnership by: ACI World, ACI EUROPE, ACI Asia-Pacific

Supporting Organisation: WORLD BANK GROUP

PERSONAL DETAILS

Title _____ First Name _____ Last Name _____

Job Title _____ Name of Organisation _____

Postal Address _____

City/State _____ Postcode _____ Country _____

Fax _____ Tel _____

Mobile _____ Email _____

CONFERENCE REGISTRATION FEES - EARLY BIRD RATES END 12 JANUARY 2018

THREE DAY REGISTRATION FEES: Includes Symposium, Welcome Reception, AE&F 2018 Conference & Gala Dinner

	STANDARD RATES	EARLY BIRD RATES
☐ ACI Members & World Business Partners	€2,155*	€1,795*
☐ ACI Economics Committee Members	€1,795*	€1,555*
☐ Non-ACI Members	€4,310*	€3,480*
☐ Airlines	€2,155*	€1,795*

TWO DAY REGISTRATION FEES: Includes Welcome Reception, AE&F 2018 Conference & Gala Dinner

	STANDARD RATES	EARLY BIRD RATES
☐ ACI Members & World Business Partners	€1,795*	€1,555*
☐ ACI Economics Committee Members	€1,555*	€1,195*
☐ Non-ACI Members	€3,590*	€3,110*
☐ Airlines	€1,795*	€1,555*

*All registrations include VAT (20%).

GROUP BOOKINGS For bookings of more than 3 people, please contact us: contactus@aviationmedia.aero

ACCOMPANYING PERSON REGISTRATION FEES (Fee includes Welcome Reception and Gala Dinner)

	STANDARD RATES	EARLY BIRD RATES
☐ ACI Members	€360*	€240*
☐ Non-ACI Members	€480*	€360*

*All registrations include VAT (20%).

PAYMENT

I will pay a total of: _____ inc VAT (20%). Company VAT number: _____

☐ Cheque or bank draft made payable to Aviation Media Ltd, PO BOX 448, Feltham, TW13 9EA, United Kingdom

☐ Visa, Mastercard or American Express credit card as authorised below:

Card Type: _____ Card Number: _____ Start Date: _____

Expiry Date: _____ Security No: _____

Name on Card: _____ Date: _____

Billing address: _____

☐ Please register me for this event. I agree to abide by these terms, ticking the box will be accepted as a digital signature.

Terms & conditions

Aviation Media Ltd occasionally makes its delegate lists available to selected industry third parties. By completing this form, attendees give permission to pass their contact details to attendees and exhibitors of this event.

☐ If such permission is denied please tick this box.

By providing your details you agree to Aviation Media Ltd contacting you about this or other relevant events or publications by post or email. If you do not wish to receive these please tick the box. ☐

Aviation Media Ltd has a 14-day payment policy and registration and entrance will only be confirmed (as well as joining instructions sent out), once full payment is complete. Conference fees include attendance at the conference, all social networking activities and all conference documentation, morning and afternoon refreshment breaks.

Delegate cancellation policy: cancellations must be made in writing and sent to aviation media (contactus@aviationmedia.aero). Cancelling more than 6 months before the event will incur a 20% administrators fee. Cancelling 2-6 months before the event will incur a 50% charge. No refunds will be issued within 2 months of the event taking place. No-shows will be billed for the full amount and will not be refunded.